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Issues paper

This report is for information

This paper studies key transnational pathways that international students use when they embark on first degree study in England.

Directions of travel

Transnational pathways into English higher education

Directions of travel: Transnational pathways into English higher education

To	Heads of HEFCE-funded higher education institutions
Of interest to those responsible for	International development; International offices; Internationalisation of higher education; International recruitment; international partnerships
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Executive summary

Purpose

1. This paper studies key transnational pathways that international students use when they embark on first degree study in England. It aims to understand better the contribution of transnational education, as delivered by British higher education providers, to international student enrolments in English higher education. This study also tracks the progression to postgraduate programmes of students who had used the transnational pathway to first degree programmes.

Key points

2. **Over a third of all international first degree entrants are recruited from transnational courses delivered overseas by UK HE providers, or partners working on their behalf.**

China and Malaysia account for the majority of such students. More than half of all first degree students from these two countries (55 per cent of the Chinese entrants, 8,300 students, and 63 per cent of the Malaysian entrants, about 3,200 students) commence their first degree directly from UK transnational education delivered overseas.

3. This research also aims to provide more detail about the slowdown in international entrants to undergraduate programmes experienced in 2012-13. **Transnational students have provided a cushion in areas where decline was experienced in the direct entry of international students to first degree programmes in 2012-13.** This is particularly evident at higher education institutions with low average tariff scores.

4. **Higher education institutions with medium and low average tariff scores are most reliant on transnational students.** They constitute more than half of the international entrants to first degree programmes at these institutions.

5. **Courses with an expected length of one year or less were the main driver of growth in transnational pathways in the period 2009- 12.** This shift towards shorter courses relies heavily on constantly high numbers of international entrants to first degree programmes. Institutions therefore need to allocate further resources if they wish to keep up a stable level of recruitment.

6. **A high proportion of transnational students on first degree programmes progress to postgraduate studies in English higher education.** In particular, more than half of the Chinese transnational students continue their studies at postgraduate level. Chinese students were also the main overall contributor to the growth in international postgraduate taught masters. This forms part of a pattern where taught masters provision in England is heavily reliant on international recruitment.

Action required

7. No action is required in response to this document.

Introduction

8. Internationalisation has played a key role in shaping the worldwide higher education landscape. The international mobility of students has grown significantly over the past decade. Similarly, many higher education providers now deliver transnational education (TNE) in countries other than their own – it could be said that higher education itself has become more mobile¹.

9. This paper studies international students who transfer from TNE programmes delivered overseas by UK higher education providers to first degree studies in England.

10. The concept of TNE becoming an international student recruitment vehicle is not new. Healey (2013) notes that TNE broadens the market for UK higher education, with evidence that it is becoming a key recruitment tool for international students progressing from overseas courses to studies in the UK². Similarly, the American Council on Education (2014) argues that its data collections suggest that double and joint degree programmes delivered by US higher education institutions (HEIs) 'may be serving primarily as a mechanism for US institutions to recruit international students'³. However, the scale of these progressions to English higher education has previously been unknown because of the limitations of the Higher Education Statistics Agency (HESA) individual student record, which is primarily devised to record students progressing through the UK education system.

11. This research addresses this data gap and aims to contribute to an improved understanding of the impact of TNE, and other education programmes delivered overseas, on international student enrolments in England. The methodology for the research can be found at Annex A. For brevity, we refer to these students as 'transnational' entrants – students who use any other pathways to start their first degree study are collectively labelled 'other international' entrants.

12. Our analysis suggests that around 34 per cent (16,500 entrants) of all international first degree entrants in England transferred in 2012-13 from programmes delivered outside England.

Types of transnational pathways

13. Interviews with higher education professionals working in international development, partnerships and student recruitment also helped us to identify sub-groups of transnational pathways. There is no agreement in the higher education community on standard definitions which explain these pathways. Therefore the following pathways are focused on activities taking place:

- a. Students progressing from HEIs' branch campuses overseas to first degree studies onshore. In such an instance usually a double degree is awarded.

¹ TNE is broadly defined as education provision delivered in a different country from that of the education institution. See, for example, British Council (2013), The shape of things to come: The evolution of transnational education: Data, definitions, opportunities and impact analysis, available online at www.britishcouncil.org/education/ihe/knowledge-centre/transnational-education/the-shape-of-things-to-come-2.

² Healey, N. (2013), 'Is UK transnational education one of Britain's great growth industries of the future?', Higher Education Review Vol 45 No 3.

³ American Council on Education (2014), Mapping international joint and dual degrees: US programme profiles and perspectives', available online at www.acenet.edu/news-room/Pages/Mapping-International-Joint-and-Dual-Degrees.aspx

- b. Students progressing from overseas programmes delivered by English HEIs jointly with overseas partner institutions which may lead to the awarding of double or joint degrees.
- c. Prior recognition of learning where the English HEIs have contributed to the design of a programme delivered by an overseas partner.
- d. Other forms of recognition of prior learning, where admissions to the second or third years of degree programmes are assessed on a case-by-case basis depending on students' grades and other entry criteria. Most of the cited examples were HNDs awarded overseas, mainly by the Scottish Qualifications Authority (SQA) and EdExcel. Our estimates show that this type of progression makes up an estimated 18 per cent (2,900 entrants) of the total transnational entrants. The majority of the entrants (about 2,000) are Chinese students.

14. This is not a comprehensive list of offshore pathways, but it identifies the major routes through which students on overseas programmes progress into first degree programmes delivered in England.

15. This is our first attempt to quantify the contribution of programmes delivered by UK education providers overseas to first degree enrolments in England. Initially, our time series dates back to 2009. The intention is to build on this work by expanding the time series and improving the quality of the data.

A note on other pathways to higher education in England

We initially attempted also to examine pathways to first degree programmes for international students studying with other providers in the UK. However, reliable data are limited to students who previously studied at further education level, or in franchise arrangements with higher education institutions. International students starting full-time first degrees through such pathways were estimated to account for 10 per cent of all entrants in 2012-13. However, data verification checks with those HEIs that outsourced entry provision to other education providers suggest that this significantly underestimates the real size of the sector. Further research is therefore needed to gain an accurate picture of activity in this area.

This study uses the HESA individual student record to identify the following major pathways followed by international students who start undergraduate first degree programmes education in England:

- a. Students recruited directly to undergraduate courses by the relevant HEIs.
- b. Students progressing into higher education from the school and further education sector, whose records were on the National Pupil Database and Individualised Learner Record.
- c. Students progressing through franchises between publicly funded HEIs and further education providers, some of them private.
- d. Students entering first degree through 'pathway' providers. These are mainly education companies delivering foundation and other programmes for profit, on behalf of the relevant HEIs (for instance Into University Partnerships, Study Group, Navitas, Kaplan, Cambridge Education Group and Shorelight Education). Some of these pathway companies allow international students to progress directly from courses delivered in their country of origin.

There are very limited data on student progressions through 'pathway' providers, mainly because most of them do not report to HESA. Students are only identified once they enrol with the relevant HEI.

Transnational pathways to first degree programmes

16. Over a third of all first degree international entrants in England in 2012-13 (34 per cent or 16,500 entrants) transferred directly from transnational programmes. The growth in such progressions from 2009-10 to 2012-13 was higher than the growth in numbers of other international entrants to first degrees: 21 per cent growth in transnational entrants (2,950 entrants), compared with 17 per cent growth in other entrants (4,700 entrants). This contributed to a slight increase in transnational entrants as a proportion of all international entrants, which grew from 33 per cent in 2009-10 to 34 per cent in 2012-13.

17. It was also the transnational entrants who fuelled the growth in overall first degree entrants from China in the period from 2009-10 to 2012-13. Transnational entrants increased by 55 per cent (almost 3,000 entrants) compared with 18 per cent growth (1,000 entrants) in other pathways to first degree programmes during the period studied.

18. Malaysia is the second largest country of origin of students after China for transnational progressions. About 63 per cent of the total entrants to English first degree programmes from Malaysia (3,200 entrants) use the transnational entry route. This proportion fell from 65 per cent in 2009; strong direct recruitment from Malaysia contributed to this shift.

19. Overall, transnational students from China and Malaysia account for an estimated 70 per cent of the total transnational entrants to first degree programmes in England. Except for Singapore, these two countries are among the largest countries for British TNE (See Annex B).

20. The majority of the transnational entrants from China in 2012-13 (66 per cent, or about 5,450 entrants) had expected course lengths between two and three years. In contrast, entrants from Malaysia have much shorter course lengths, with 56 per cent of them (1,800 entrants) having expected course lengths of one year or less.

21. The next largest populations came from Nigeria and Hong Kong (Special Administrative region, China), which contributed 550 and 500 entrants respectively. Transnational entrants from Nigeria appear to have mitigated the bigger declines experienced in other international entrants from the country.

22. The proportion of entrants to first degree programmes from Vietnam taking a transnational route has also increased significantly, from a low base of 18 per cent (85 entrants) in 2009-10 to 38 per cent (350 entrants) in 2012-13.

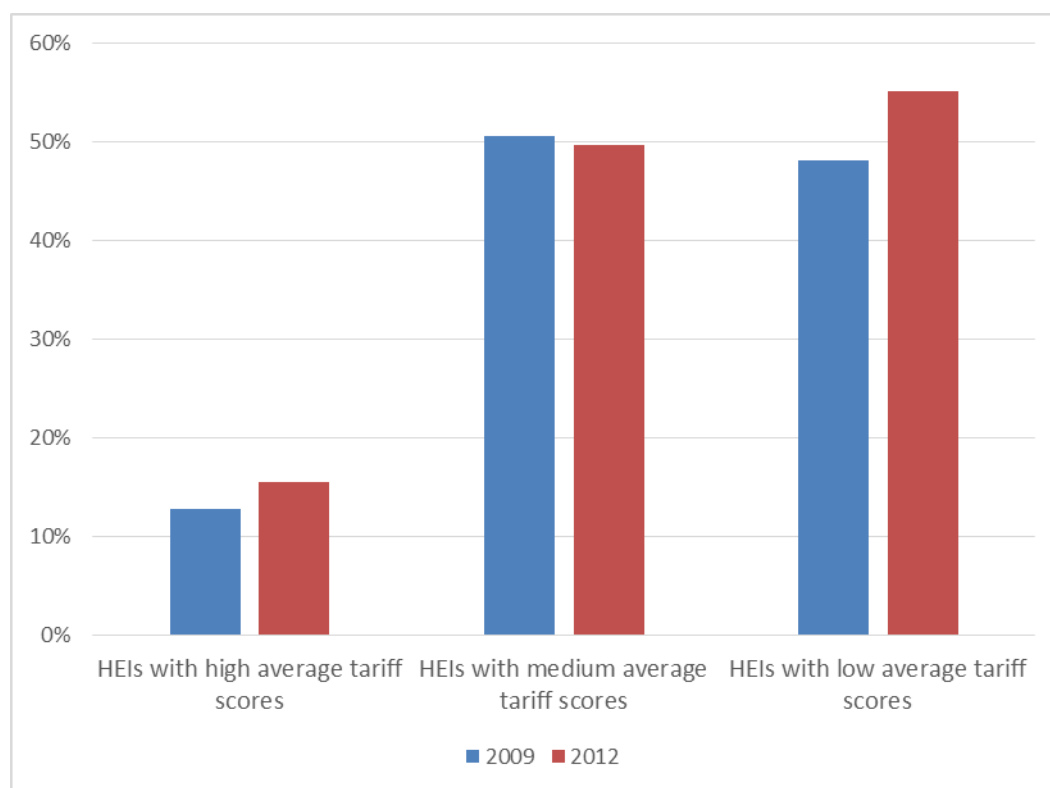
Varied propensity in recruitment of transnational students across institutional groups

23. There is great variability across the higher education sector in the proportion of transnational students entering undergraduate programmes as a proportion of the total international entrants. HEIs with high average tariff scores have a lower proportion of transnational students: 16 per cent (3,200 entrants) in 2012-13, compared with 55 per cent (5,900 entrants) for HEIs with low average tariff scores⁴. HEIs with medium average tariff scores have an almost equal split between their transnational entrants and those recruited through

⁴ HEIs are grouped according to the average tariff scores of their young (under 21) UK-domiciled undergraduate entrants. The average tariff score considers all such entrants who hold Level 3 qualifications subject to the UCAS tariff. Institutions in the top third of the ranking by average tariff score are said to have 'high average tariff scores', and those in the bottom third have 'low average tariff scores'.

standard recruitment and other onshore pathways. Figure 1 illustrates that this proportion has remained almost unchanged during the period from 2009-10 to 2012-13.

Figure 1: Offshore entrants as proportion of total international entrants to first degree programmes in England (2009-10 and 2012-13)⁵



24. The increase from 13 per cent (1,960 entrants overall) in 2009-10 to 16 per cent (3,200 entrants) in 2012-13 for HEIs in the high average tariff score group, was predominantly driven by entrants transferring from overseas branch campuses to the respective HEI in England. Almost half of these transnational entrants are concentrated in a small number of universities – just eight had more than 100 such entrants. There was a significant increase in the proportion of transnational entrants to low-average-tariff HEIs, from 48 per cent (5,200 entrants) in 2009-10 to 55 per cent (6,000 entrants) in 2012-13. However, most of this change in proportion can be attributed to a decline in international students starting first degree programmes through other pathways.

Causes of the slowdown in 2012-13

25. Having identified the main pathways providing entry to first degree programmes in England, we are able to gain a better understanding of the slowdown in all international undergraduate entrants in 2012-13, which was discussed in HEFCE 2014/08a⁶. It appears to have had a varied effect on different institutional groups.

⁵ Specialist institutions are not included on this chart because of the very small number of transnational entrants to first degree programmes.

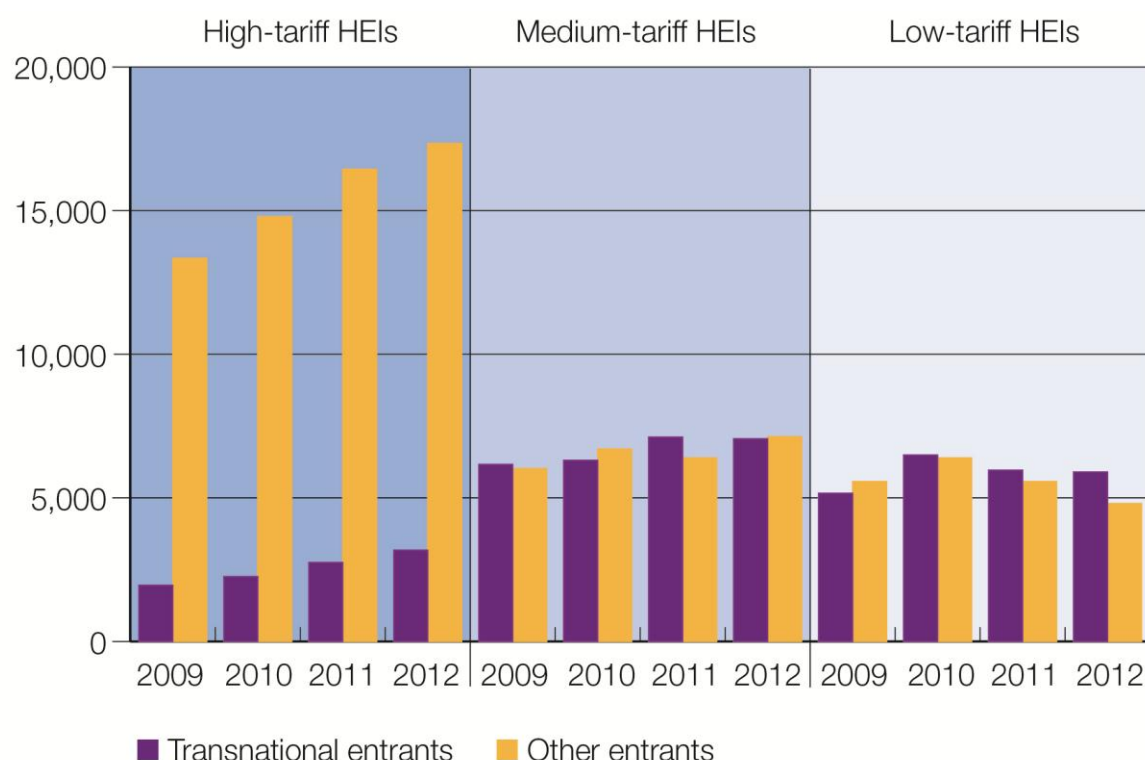
⁶ HEFCE (2014), 'Global demand for English higher education: An analysis of international student entry to English higher education courses' (HEFCE 2014/08a), available online at www.hefce.ac.uk/pubs/year/2014/201408a/

26. Across those HEIs which experienced decline in their overall international entrants to first degree programmes, 22 per cent of the decline can be attributed to a few HEIs which were unable, in some cases temporarily, to sponsor new international students.

27. Figure 2 shows transnational and other international entrants to first degree programmes, categorised by institutional groups ranked by their average tariff score. In HEIs with high average tariff scores, numbers have been growing steadily since 2009-10. A more varied picture emerges for the HEIs with medium and low average tariff scores. At HEIs with low average tariff scores, transnational entrants appear to have mitigated the impact of higher levels of decline among international entrants using other pathways (including direct recruitment). This group was also most affected by the small number of HEIs' temporary inability to sponsor new students.

28. The countries which experienced the most significant declines in transnational entrants were in South Asia, for instance India, Pakistan and Sri Lanka, where the decline was mirrored across all types of entrants. Not all South Asian countries experienced such declines: exceptions included Bangladesh and a few other low income countries. Anecdotal evidence based on interviews with international development professionals suggests that lower recruitment in these countries has led some HEIs to switch their recruitment efforts to students who are already in England. Such students may have maintained growth for countries like Bangladesh, and cushioned sharper levels of decline elsewhere.

Figure 2: Transnational and other entrants to first degree programmes by institutional groups 2009-2012



29. The marginal decline in transnational entrants in Malaysia contrasts with growth experienced in direct recruitment from Malaysia to first degree programmes. Changes in the local higher education context are expected to place downward pressure on progressions from Malaysia in the short term.

30. Declines in transnational entrants from Malaysia were mainly concentrated in students starting their first degree programme in the third year. This was noted across all institutional groups, but declines were most pronounced at HEIs with medium average tariff scores. One of the possible causes, based on interviews with some of the affected HEIs, is changes in the Malaysian Qualifications Framework, where diploma students were graded at Malaysian Qualifications Agency (MQA) level 4 instead of Level 5⁷. This is believed to have had an impact on all diploma holders from Malaysia progressing into the third year of first degree programmes in England, with progression to the second year recommended instead⁸. This change requires an additional year in England for completion of a 'top-up' programme. It is likely that some students may be financially unable to afford a longer period of study in England.

31. A further development which has affected a number of English HEIs is a small number of very large Malaysian private education providers acquiring their own degree-awarding powers. This means that the degree-awarding powers of their English partner institutions are less needed. It is not clear at this stage whether a new type of strategic partnership is replacing the existing double or joint degree arrangements, where part of the study, usually in the final year, takes place in the UK.

32. Dynamic changes in Malaysian higher education will continue to affect transnational progressions to England. The downward pressure is likely to continue as providers acquire degree-awarding powers and their strategic priorities change accordingly. This is expected to affect the number of Malaysian students on top-up programmes in England with expected course lengths of less than a year.

33. The strong growth in transnational progression from China has been mainly driven by growth at high-average-tariff HEIs, mostly from overseas branch campuses. Decelerated growth in progression to the third year of first degree programmes was noted in medium-tariff HEIs, and there was some decline in low-tariff HEIs. This may be partly attributed to tightened regulation of joint and double degrees in China, mainly related to concerns over the quality of provision⁹.

Shorter courses leading to declines in overall period of study

34. One of the key characteristics of transnational entrants is that they spend significantly shorter periods of study in England, compared with the standard first degree population. Most significant growth since 2010-11 was observed in courses with a duration of one academic year or less, which grew by 24 per cent (900 entrants). This shift towards shorter study in the pattern of entry to undergraduate degrees may be partly attributable to the impact of the global financial crisis of 2008-09 on middle-class income, making shorter courses more desirable for those who previously would have considered longer periods of study. Alongside this, an emerging middle class in East Asia may be providing another driver towards shorter courses, which widen the scope to access English higher education for overseas families who otherwise would have been unable to do so.

⁷ See www.mqa.gov.my/portal2012/default/en/mqf.cfm

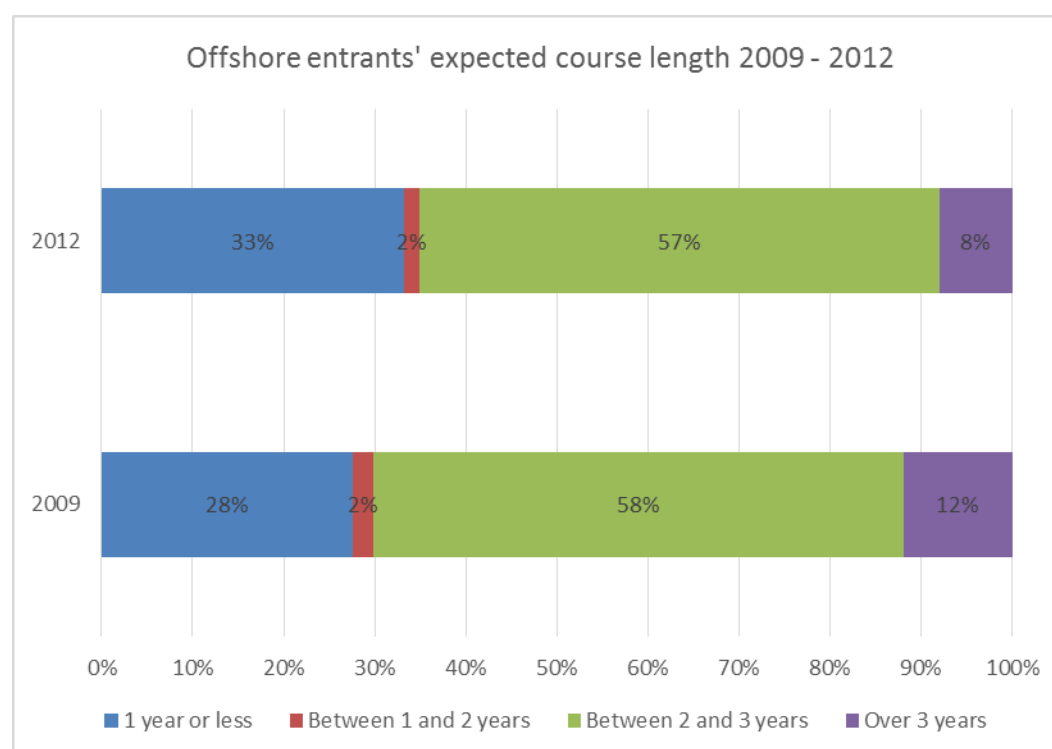
⁸ A memorandum of arrangement was signed in April 2012 between the Malaysian Qualification Agency and the Quality Assurance Agency, aimed at greater alignment of quality assurance practices in the two countries.

⁹ These are mainly regulated by the China Education Association for International Exchange (http://en.ceiae.edu.cn/en_about_detail.php?id=3473). Degree equivalences and partnerships at postgraduate level are managed by the China Academic Degrees and Graduate Education Development Centre (www.cdgc.edu.cn/xwyyjsjyxx/aboutus/intro/277270.shtml).

35. Shorter courses have a significant impact on the recruitment efforts of HEIs, and on overseas tuition fees income. The small downturn in the number of entrants to higher education masks a decline in the overall period of study which these students would have spent in England had they undertaken longer courses. Shorter periods of study mean that institutions are relying on a high number of students continuously starting undergraduate programmes.

36. While transnational entrants across all course lengths increased in absolute terms, the shortest period of study – courses up to one year – was the only area that increased its proportion during the period from 2009-10 to 2012-13, from 28 per cent (3,700 entrants) to 33 per cent (5,500 entrants).

Figure 3: Offshore entrants' expected course lengths (2009 and 2012)



Are transnational pathways also contributing to postgraduate programmes?

37. In addition to transnational pathways' importance to first degree programmes, the population of students progressing from transnational programmes into first degree programmes was found to be a major contributor to subsequent postgraduate enrolments. About a third of all transnational students who started first degree programmes through transnational programmes continued their studies at postgraduate level in the UK¹⁰. Given the limited time series dating back to 2009-10, we are only able to track students who entered first degree programmes in 2009-10 and 2010-11 and continued into postgraduate programmes, mainly at taught masters level two years later. Some 5,100 students from the population who started their first degrees in 2010-11 were continuing at postgraduate level by 2012-13. The majority of these students (82 per cent, 4,130 students in 2012-13) were from China. Entrants from other countries have much smaller continuation rates to postgraduate study. The countries after China which had the

¹⁰ While this analysis is based on **entrants** to first degree programmes in England only, students who chose to **continue** their study at postgraduate level in another nation of the UK were included.

highest proportions of transnational entrants continuing into postgraduate education were Malaysia (8 per cent, 240 students), Nigeria (20 per cent, 95 students), India (12 per cent, 90 students) and Vietnam (37 per cent, 70 students).

Table 1: First degree entrants in 2010-11 continuing in postgraduate studies after two years

Country	Transnational entrants in postgraduate study	Total transnational entrants 2010-11	Transition rate
China	4,130	7,440	56%
Malaysia	240	3,070	8%
Nigeria	95	493	20%
India	90	736	12%
Vietnam	70	188	37%

38. At this stage we are unable to establish how many international students from UK TNE programmes transfer directly into postgraduate programmes in England.

China in focus

39. Of all transnational students from China who started their first degree programme in 2009, 59 per cent continued their studies at postgraduate level. These transitions occur within three years of the start of their programme. Since the latest data date from 2012-13, we can only allow two years for the 2010-11 entrants, who show a 56 per cent transition rate (4,130 students). This will most likely increase by a couple of percentage points in 2013-14, when students on programmes longer than two years will qualify and embark on postgraduate programmes.

40. Students from China made up an estimated 82 per cent of the total transnational population who continued their studies at postgraduate level (4,150 of a total of 5,100 overseas students). Students from other administrations with high numbers of transnational students, such as Malaysia and Hong Kong (Special Administrative Region, China), have relatively low transition rates (240 Malaysian students and 40 from Hong Kong).

41. In an earlier report we argued that growth in postgraduate students from China partly offset declines elsewhere¹¹. We can now attribute 45 per cent of the growth in Chinese taught masters in 2012-13 compared with the previous year to an increase in the number of transnational students continuing their studies at postgraduate level (1,100 students). This finding highlights the importance of postgraduate degrees as a component of student decision-making for transnational entrants from China to undergraduate programmes.

42. To build a fuller profile of the transnational entrants we also considered their entry qualifications. Almost 3,000 of the transnational entrants in 2012-13 (18 per cent) held an HND on entry. The majority of these students – almost 2,000 – were based in China. Interviews with HEIs active in the recruitment of HND students in China suggest that this is largely attributable to the recruitment of students with qualifications awarded by SQA¹². Analysis of the transition rates

¹¹ HEFCE (2014), Global demand for English higher education: An analysis of international student entry to English higher education courses (HEFCE 2014/08a), available online at www.hefce.ac.uk/pubs/year/2014/201408a/

¹² More about the SQA's partnership with the Chinese Service Centre for Scholarly Exchange in delivering HNDs through some 30 universities across China can be found at www.sqa.org.uk/sqa/66134.4612.html

of transnational entrants with HND qualification on entry shows similar rates to the transnational population with other entry qualifications.

43. Findings from the Council of Graduate Schools in the USA show that for the first time since the start of their data collection record in 2004, there was a decline (of 1 per cent) in entrants from China to postgraduate programmes in the USA in 2014¹³. The high contribution of transnational entrants to postgraduate programmes delivered in England appears to be a distinct feature of postgraduate education in England compared with the USA.

44. Transnational students have boosted growth in demand for postgraduate degrees, which suggests an increasing reliance on students entering English higher education through programmes delivered overseas. This also highlights a risk associated with the potential slowdown in transnational entry, which will also affect entry to postgraduate taught programmes. The decelerated growth in Chinese students' entry to the third year of first degree programmes was noted in 2012-13. At this stage it is not clear whether this is a one-off event or a beginning of a trend, and its potential impact on demand for postgraduate taught programmes remains uncertain.

Conclusions

45. Over a third of the international entrants to first degree programmes (34 per cent or 16,450 entrants) in 2012-13 came through programmes delivered overseas by UK education providers.

46. Some of the countries with the highest proportions of students starting undergraduate studies in England are also among those with the largest TNE profiles. Transnational pathways are the most significant route to English higher education for students from China and Malaysia, where they are estimated to account for over half of the overall entrants to first degree programmes. However, the profile of the students from these two countries is very different.

47. The majority of the transnational entrants from China in 2012-13 (66 per cent, or about 5,450 entrants) had expected course lengths between two and three years. In contrast, entrants from Malaysia have much shorter course lengths, with 56 per cent of them (1,800 entrants) having expected course lengths of one year or less. While a very small proportion of Malaysian transnational undergraduate entrants continue into postgraduate education (comparable to the rates for students from Hong Kong (Special Administrative Region, China) or Singapore), more than half the Chinese transnational entrants pursue postgraduate studies. It appears that postgraduate degree is a key motivation factor for students from China who in the first instance undertake first degrees.

48. Transnational undergraduate students from China drove the growth in demand for postgraduate taught courses in 2012-13 compared with the previous year. About 45 per cent of this growth (1,100 students) can be attributed to transnational entrants.

49. While the expected course length of transnational entrants poses some recruitment and financial challenges on HEIs, it has also emerged as a cost-efficient route to English higher education for aspiring middle-class families in East Asia. Similarly, shorter courses may have

¹³ Council of Graduate Schools (2014), 'Findings from 2014 CGS International Graduate Admissions Survey. Phase III: Final offers of admissions and enrolment', available online at www.cgsnet.org/benchmarking/international-graduate-admissions-survey

widened the scope to access English higher education for overseas families who otherwise would have been unable to do so.

50. While we expect a decline in transnational entrants from Malaysia in the short run, we anticipate that the enabling environment for TNE in the country and the wider South East Asia region will improve in the long run. Malaysia is the only country in the region whose higher education degrees awarded through TNE are recognised in China. Alongside Singapore, it will continue to attract international students from the region into TNE programmes. Further harmonisation of higher education systems across the region is set to take place, an additional boost coming through the Association of the South East Asian Nations Economic Community in 2015¹⁴. While not many students in this region outside Malaysia use transnational pathways to English higher education, this number is expected to grow.

51. East Asia is England's main source of growth for international students. A recent study by the United Nations Educational, Social and Cultural Organisation's Institute for Statistics shows that international student mobility is higher within East Asia than outside the region¹⁵. If this trend continues, it will affect mobility to England and the other main English-speaking destinations in the long run. One way to maintain relevance to the wider higher education systems in the region is through engagement. HEIs embedded in the local education structures will most likely benefit in the long-run from increasing intra-regional levels of student mobility, and will have better access to deeper and more comprehensive collaborative partnerships with institutions in the region.

¹⁴ Further details at www.asean.org/communities/asean-economic-community

¹⁵ UNESCO Institute for Statistics (2014), Higher education in Asia: Expanding out, expanding up. Available online at www.uis.unesco.org/Education/Pages/higher-education-asia-report.aspx

Annex A: Methodology

1. This is our first attempt to quantify the contribution of programmes delivered by UK education providers overseas to international first degree enrolments in England. The time series date from 2009-10 to 2012-13. We intend to build on this work by expanding the time series and improving the quality of the data.

2. This analysis is based on the individualised student record for 2012-13, as reported by higher education institutions (HEIs) to the Higher Education Statistics Agency¹⁶. This analysis only covers publicly funded HEIs in England.

This analysis is based on entrants' data compared with overall enrolment. It focuses on the latest student entry to the respective programmes of study.

3. The following broad criteria were used when defining the offshore student population:

- instances when the year of course is greater than the year of student on this instance (for instance new entrants joining their respective programme in the second or third year. This is an indicator that they have previously studied elsewhere)¹⁷
- students reported to be studying on collaborative programmes between the reporting HEI and an overseas partner¹⁸
- some additional criteria to reflect more accurately institutional circumstances (such as specific course titles for the students in question).

4. The above data set was refined as follows.

a. Students with reduced returns were excluded, to remove incoming visiting or exchange students¹⁹. Dormant students and students on low-credit-bearing courses were excluded.

b. Student records which had appeared on the National Pupil Database or the Individual Learner Record since 2007-08 in the two years before starting their course were excluded. This reduces the impact of onshore progressions so that the analysis can mainly consider progressions from programmes delivered offshore. Student records which had previously been reported to the Higher Education Statistics Agency were excluded. This analytical step considers two years' previous study before entry to the current course. The analysis covers student records since 2007. This means that students who have changed HEIs during their study will not be mistakenly counted as offshore students.

5. Data checks and interviews with HEIs that actively use offshore pathways for international student recruitment helped us refine our methodology, and confirmed the reliability of the newly devised dataset.

6. Additional analysis was carried out on the transnational student population, as defined above, which tracks the progression of the transnational students into postgraduate programmes.

¹⁶ For more information see: www.hesa.ac.uk/c12051

¹⁷ For more information see www.hesa.ac.uk/c12051/a/YEARPRG and www.hesa.ac.uk/c12051/a/YEARPRG

¹⁸ Defined as categories Y and Z here: www.hesa.ac.uk/c12051/a/EXCHANGEI

¹⁹ For more information see: www.hesa.ac.uk/c12051/a/REDUCEDI

Annex B: Aggregate offshore numbers (TNE) and major countries of origin for transnational students 2012-13

Country	Aggregate Offshore numbers	Transnational entrants to first degree programmes	Other entrants to first degree programmes	Transnational ratio (%)
China	40,000	8,290	6,660	55%
Malaysia	65,525	3,175	1,865	63%
Nigeria	25,650	560	1,545	27%
Hong Kong	25,580	500	3,530	12%
Bangladesh	6,505	480	370	56%
India	9,175	390	1,550	20%
Vietnam	6,055	330	545	38%
Pakistan	41,665	275	695	28%
Sri Lanka	8,950	245	255	49%
Singapore	45,915	185	1,385	12%

Note: Hong Kong is a Special Administrative Region of China.